2009 Tax Documents Checklist

Name: ___________________________________

Please indicate with a checkmark anything that applies to your tax situation and include the related documents/information with your tax documents.

☐ Personal information

- ☐ **Social security numbers, full names and date of birth for all taxpayers and dependents**
- ☐ **Dependent changes – add or remove dependents**
- ☐ **Changes in contact information: address, phone numbers, e-mail address**
- ☐ **Confirmation of/or changes to direct deposit information for refunds (submit voided check)**

☐ Income and employment information

- ☐ **W-2 forms**
- ☐ **Pension/retirement – 1099-R, Form 5498**
- ☐ **Alimony received or paid and SSN**
- ☐ **Partnership or S Corporation K-1s**
- ☐ **Rental income, expenses, assets purchased**
  ** Rental Properties Template available
- ☐ **Miscellaneous Income - 1099-MISC**
- ☐ **Unemployment compensation – 1099-G**
- ☐ **State tax refunds**
- ☐ **Cancellation of debt - 1099-C**
- ☐ **Social Security - 1099-SSA**

☐ Investment information

- ☐ **Interest income – 1099-INT**
- ☐ **Dividend income – 1099-DIV**
- ☐ **Proceeds from broker transactions – 1099-B**
  - ☐ **Provide Cost Basis - date purchased and purchase price for each security sold**

☐ Deductions, credits, and other adjustments

- ☐ **Homeowners**
  - **HUD statements if you bought, sold, or refinanced any property**
  - **Mortgage interest – 1098**
  - **Real estate taxes paid in 2009 (whether you itemize or not)**
- ☐ **Charitable contributions** ** Charitable Contributions Template available
  - **Cash contributions by date**
  - **Non-cash contributions and their associated value** **Valuation guide available
  - **Charitable mileage**
- ☐ **Sales tax information – sales tax paid on vehicles, motorcycles, boats, etc. (whether you itemize or not)**
- ☐ **Hybrid car information – make, model and date purchased**
- ☐ **Distributions/contributions related to H.S.A. accounts**
- ☐ **IRA contribution amounts - Traditional or Roth**
- ☐ **Unreimbursed employee business expenses**
- ☐ **Tax preparation fees, job hunting expenses, investment management fees**
- ☐ **Moving expenses**
- ☐ **Residential energy credit qualified improvements** ** link for qualifying products on website

☐ Children/student information

- ☐ **Child care expenses and provider information – expenses by child**
  - **Name, address, SSN or tax ID number of child care provider**
- ☐ **Investment income for dependent children**
- ☐ **Student loan interest – 1098-E**
- ☐ **Education expenses/college tuition paid – 1098-T**
- ☐ **Distribution from 529 or education fund – 1099-Q**

☐ Self-employment information

- ☐ **Income**
- ☐ **Business-related expenses including mileage and assets purchases**
- ☐ **Health insurance premiums paid and retirement contribution amounts**
- ☐ **Home office expenses** **Home office deduction information available

☐ Estimated tax payments **– dates and amounts paid**

☐ Prior year's tax return (new clients)

** Visit www.neighborhoodcpa.com for links and forms